



Filing ID #10020770

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Daniel Adam Freilich  
**Status:** Congressional Candidate  
**State/District:** VT00

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 04/24/2018  
**Period Covered:** 01/01/2017– 03/31/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Adient plc Ordinary Shares (ADNT) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	None
ADT Corporation (ADT) [ST]		None	Capital Gains, Interest	None	\$201 - \$1,000
Allied Property Group [OT]	SP	None	Interest	\$1,001 - \$2,500	\$5,001 - \$15,000
DESCRIPTION: Loan repayment with interest					
Anadarko Petroleum Corporation (APC) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200
Ariel Apprec Investor CL [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1,001 - \$2,500
Ariel Investor CL [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1 - \$200
Autodesk, Inc. (ADSK) [ST]		None	Capital Gains	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Biogen Inc. (BIIB) [ST]		None	Capital Gains	None	\$201 - \$1,000
Blackrock Global Allocation C [MF]	SP	\$1,001 - \$15,000	Capital Gains	None	\$1 - \$200
Braddock Multi Strategy Income Instl CL (BDKNX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Braddock Multi Strategy Income Instl CL (BDKNX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Broadcom Limited - Ordinary Shares (AVGO) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
Calvert Intl Equity CL A [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Cavanal Hill World Energy Instl CL (AIWEX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Cavanal Hill World Energy Instl CL (AIWEX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Center Coast MLP Focus I [MF]		\$1,001 - \$15,000	Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Citibank [BA]		\$1,001 - \$15,000	Interest	None	None
Citrix Systems, Inc. (CTXS) [ST]		None	Capital Gains	None	\$201 - \$1,000
Cohen & Steers Quality Income Realty Fund Inc (AIWEX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Cohen & Steers Quality Income Realty Fund Inc (RQI) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Comcast Corporation - Class A (CMCSA) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
CommerceHub, Inc. - Series A (CHUBA) [ST]		None	Capital Gains	None	\$1 - \$200
Community Reinvestment Act Qualified Investment Instl CL [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Conduent Incorporated (CNDT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
CRA Qualified Invst [MF]		None	Dividends	None	\$201 - \$1,000
Dolby Laboratories (DLB) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
Federated Kauffmann Large Cap Instl CL (KLCIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	None	None
Federated Kaufmann Large Cap Instl CL (KLCIX) [MF]		\$1,001 - \$15,000	Capital Gains	None	None
Federated Strategic Value Dividend Fund [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Federated Strategic Value Dividend Instl CL [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Federated Strategic Value Dividend Instl CL [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Fidelity Advisor Industrials CL I (FCLIX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Fluor Corporation (FLR) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
Gabelli SRI CL I [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Gateway CL Y [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Gateway Fund Y [MF]		None	Dividends	None	\$1 - \$200
Invesco Premier Inst [MF]		None	Dividends	None	\$1 - \$200
Investment Managers Center Coast MLP Focus Instl CL [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	None
IShares Barclays [MF]		None	Capital Gains	None	\$1 - \$200
Ishares Core S&P 500 ETF [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IShares Core S&P 500 ETF (IVV) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
IShares Core US Aggregate [MF]		None	Capital Gains	None	\$1 - \$200
IShares MSCI KLD 400 Social ETF [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
IShares Russell 2000 Growth ETF (IWO) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
IShares Russell 2000 Growth ETG (IWO) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
iShares Short Treasury Bond ETF (SHV) [ST]		None	Capital Gains	None	\$1 - \$200
iShares TIPS Bond ETF (TIP) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
James Balanced Gold Rainbow Instl CL (GLRIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
James Balanced Golden Rainbow Instl CL (GLRIX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
John Hancock Intl Growth CL I (GOGIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
John Hancock Multifactor Mid Cap ETF (GOGIX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
John Hancock Multifactor Mid Cap ETF (JHMM) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
John Hancock Regional Bank CL I (JRBFX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Johnson Controls International plc Ordinary Share (JCI) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
JPMorgan Core Plus Bond Select CL [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Liberty Broadband Corporation - Class A (LBRDA) [ST]		None	Capital Gains	None	\$1 - \$200
Liberty Interactive Corporation - Series A Liberty Interactive (LINTA) [ST]		None	Capital Gains	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Liberty Media Corporation - Series C Liberty Formula One (FWONK) [ST]		None	Capital Gains	None	\$1 - \$200
Medtronic plc. Ordinary Shares (MDT) [ST]		None	Dividends, Interest	None	\$1 - \$200
MFS Intl Diversification CL I [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
MFS Intl Diversification CL I [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
MFS Intl Diversification CL I (MDIJX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
MFS Intl Diversification CL I (MDIJX) [MF]	SP	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
MS Active [MF]		None	Capital Gains, Dividends	None	None
National Oilwell Varco, Inc. (NOV) [ST]		None	Capital Gains, Dividends	None	\$1 - \$200
Neuberger Berman Socially Responsive Instl CL [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
NFCU [BA] DESCRIPTION: Checking and savings combined	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
NFCU [IH]		\$1,001 - \$15,000	Tax-Deferred		
NFCU [BA] DESCRIPTION: Joshua	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
NOW Inc. (DNOW) [ST]		None	Capital Gains	None	\$201 - \$1,000
Nucor Corporation (NUE) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
Pentair plc. Ordinary Share (PNR) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Prudential Short Duration High Yield Income CL Z [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Rental Income Vermont House [OT]	JT	\$50,001 - \$100,000	Rent	\$201 - \$1,000	\$5,001 - \$15,000
DESCRIPTION: Daniel's primary home					
SanDisk Corporation (SNDK) [ST]		None	Capital Gains	None	\$201 - \$1,000
Seagate Technology PLC - Ordinary Shares (STX) [ST]		None	Capital Gains, Dividends	None	\$1,001 - \$2,500
SPDR Bloomberg Barclays High Yield Bond ETF (JNK) [ST]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Starbucks Corporation (SBUX) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
T. Rowe Price [OT]	SP	\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Retirement savings					
TE Connectivity Ltd. New Switzerland Registered Shares (TEL) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
Thornburg LTD Term Income CL I [MF]	SP	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Thornburg LTD Term Income CL I (THIIX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
TIAA [OT]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Retirement savings					
TIAA [OT]	SP	\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Retirement savings					
Twitter, Inc. (TWTR) [ST]		\$1,001 - \$15,000	Dividends	None	None
Tyco International plc (TYC) [ST]		None	Dividends	None	\$201 - \$1,000
UnitedHealth Group Incorporated Common Stock		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(UNH) [ST]					
USAA [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Checking and Savings combined					
Vaneck Vectors Global Alternative Energy ETF [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Vanguard REIT ETF (VNQ) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Vanguard Short Term Bond ETF [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vertex Pharmaceuticals Incorporated (VRTX) [ST]		None	Capital Gains	None	\$1 - \$200
Weatherford International plc (WFT) [ST]		None	Capital Gains	None	\$1 - \$200
Western Digital Corporation (WDC) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
Xerox Corporation (XRX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

**SCHEDULE C: EARNED INCOME**

Source	Type	Amount Current Year to Filing	Amount Preceding Year
DFDS CL/JFLP	USNR salary	N/A	N/A
Defense Finance/VA	VA salary	N/A	N/A
Analytic Services Inc	Spouse salary	N/A	N/A

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	NFCU	Mar 2018	Credit Card	\$6,869.14
JT	USAA	Nov 2016	Mortgage VT house	\$500,001 - \$1,000,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Wells Fargo	Aug 2008	Mortgage VA house	\$100,001 - \$250,000
JT	USAA	Mar 2018	Credit Card	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
President	Vermont Political Revolution Corporation

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Daniel Adam Freilich , 04/24/2018